

## **EXHIBIT 9**



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# The Best CRM Software for 2024

A customer relationship management (CRM) system helps your business increase sales, enhance collaboration, and improve customer satisfaction. We test and rate leading CRMs to help you find the right one for your needs.

By Gadjo Sevilla & Neil McAllister

Updated February 6, 2024



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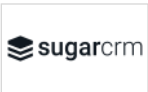
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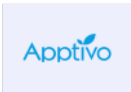
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*\*Deals are selected by our commerce team*

A simple app for tracking contacts may be enough for very small businesses, but a full-fledged CRM system offers much more in terms of sales and support. A CRM lets an organization keep track of every aspect of each customer relationship, including initial purchases, support calls, and notes from sales reps' visits. Moreover, CRM systems often integrate with other business software, such as email marketing systems, to add further functionality.

However, there are so many CRM systems out there that it can be hard to choose one. That's why we've done the hard work for you and rated a variety of products from different vendors to help you make the best choice. Most that we've evaluated for this roundup have all the features small businesses need, and some can scale to handle the demands of large enterprises. If that seems overwhelming, we've also reviewed CRM products that are tailored for small businesses and beginners. If you're ready to use powerful tools to manage your customer relationships, keep reading for our suggestions, as well as tips on how to compare the different options.

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## Deeper Dive: Our Top Tested Picks

### Salesforce Sales Cloud Lightning Professional

#### Best Overall

 ●●●●○ 4.5 Outstanding

Why We Picked It

Salesforce basically wrote the book on CRM, and has maintained its lead even as younger, more agile competitors have risen to challenge it. There's probably no feature you could want from a CRM that Salesforce can't deliver. What's more, its pricing is tiered such that its entry-level Salesforce Essentials offering is affordable even to small businesses.

Who It's For

You really can't go wrong with Salesforce—unless, that is, it offers that much more than you ever expect to need. Salesforce is one of the few products we tested that truly scales up to the needs of the largest enterprises. However, if your ambitions aren't quite that lofty, you might want to explore some other options, which could get you started faster and be lighter on your pocketbook.

PROS

- ✓ Wide range of advanced features and customizations
- ✓ Powerful social collaboration options and third-party app marketplace
- ✓ Outstanding workflows and solid performance

CONS

- ✗ Comes with a steep learning curve
- ✗ Pricey

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## Zoho CRM

**Best for Zoho Platform Customers**

  **4.5 Outstanding**

### Why We Picked It

Zoho offers an extensive suite of SaaS business software, and its CRM offering is a standout tool. Its feature set rivals even behemoth Salesforce. Its latest additions include Zia, an AI-powered analytics engine for spotting sales trends and anomalies; and Canvas, a drag-and-drop interface editor. It doesn't hurt that Zoho CRM is priced within reach of smaller teams.

### Who It's For

Zoho CRM has a lot to recommend to any business. If you're already using other products in the Zoho portfolio, it's practically a no-brainer. Only Salesforce will give you more features with a more polished UI. Then again, if you like the idea of the Zoho suite, but feel daunted by Zoho CRM's feature set, you should consider [Begin by Zoho](#), the company's lightweight CRM designed specifically for small businesses.

#### PROS

- ✓ Deep feature set
- ✓ Near-total customizability, especially with Canvas Builder

✓ Flexible AI layer at higher price tiers

✓ Integrated gamification features

CONS

✗ Steep learning curve

✗ Most advanced features only accessible at the higher-priced tiers

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HubSpot CRM

Easiest to Use

●●●●○

3.5 Good

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6/33

Why We Picked It

HubSpot is a hybrid tool that combines CRM with marketing and help desk capabilities. That union might make it more compelling to some businesses than other, standalone offerings, even if its CRM feature set isn't quite as rich. It also shines in its ability to get teams up and running quickly, typically within a couple of weeks.

Who It's For

If you're starting at square one with CRM, and you'd like marketing and service tools to go along with it, HubSpot could be a good pick. Its integrated approach means your teams won't need to switch between multiple tools. Just check your budget first, because HubSpot comes at a premium price.

PROS

- ✓ Robust feature set
- ✓ Generous free version
- ✓ New support for integrated payment processing

CONS

- ✗ Some commonplace features are only available at higher pricing tiers
- ✗ Some features have a learning curve

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Freshsales CRM

Best Basic CRM

●●●●○ 4.0 Excellent



Why We Picked It

Freshsales is a solid, entry-level CRM that’s suitable for most small to midsize businesses. Although it lacks features when compared to other CRMs, it has lately done a good job of building integrations with other business software, such as calendars, email marketing software, and tools like DocuSign.

Who It's For

Give Freshsales a look if you want a CRM that’s functional, but won’t overwhelm your sales team with features (particularly if you’re already using some of the software on Freshsales’ list of integrations). Its lightweight approach should let your team get up to speed and start closing deals, for which they’ll thank you.

PROS

- ✓ Freshsales simplifies the CRM process for small businesses.
- ✓ Extensive customization options.
- ✓ Proactive AI assistant
- ✓ Various integrations to extend functionality.

CONS

- ✗ No reports available in the free plan.
- ✗ Determining which is the best plan can be time consuming.

SPECS

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## Zendesk Sell

**Best for Integration With Zendesk Products**

●●●●○ 4.0 Excellent

### Why We Picked It

Zendesk has its roots in help desk software, but it later branched out into CRM. As a result, it's tightly integrated with Zendesk for Service, and its features skew toward help desks more than some other CRMs we tested. Even so, it's feature-rich enough to serve as a general-purpose CRM for any organization.

### Who It's For

If you're already a Zendesk customer, this is probably the CRM for you. It's also well worth a look if a help desk is your primary use case. If, on the other hand, you need marketing automation features more than service support, you should probably look elsewhere.

PROS

- ✓ Excellent integration with Zendesk's help desk software
- ✓ Explorer feature has useful reporting options
- ✓ Easy onboarding and team-creation features
- ✓ Useful Smart Lists

CONS

- ✗ Quickly gets pricey beyond the lowest tier
- ✗ Limited pipelines, even at the highest-priced tiers
- ✗ Basic email and template editor

SPECS

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## Less Annoying CRM

**Best for Start-Ups**

●●●●○ 4.0 Excellent

Why We Picked It

Less Annoying CRM is positioned as an affordable turnkey system for small businesses and sole proprietors. It offers a good collection of essential features, combined with flat-rate pricing that's among the cheapest of all the products we tested. Ease of use is its key selling point, which is great for companies with limited CRM experience. Its user interface is straightforward and approachable. Also, Less Annoying's responsive web UI works as well on mobile devices as it does on desktop browsers.

Who It's For

Budget-conscious companies should give Less Annoying CRM a look, but it's also a good choice for businesses that want a stripped-down, easy-to-use CRM that doesn't require a lot of complicated setup and configuration. Just be aware that its design simplicity means it's less feature-rich than more enterprise-ready solutions. For example, Less Annoying's reporting functions are relatively weak compared to those of more sophisticated systems. Although you can extend the system's capabilities with Zapier integrations, that added complexity might negate some of what makes it "less annoying."

PROS

- ✓ One affordable plan
- ✓ Plenty of support and help options
- ✓ Looks great on mobile

CONS

- ✗ Limited reporting capabilities
- ✗ No way to add dedicated leads

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**Creatio CRM**  
**Best for Large Sales Teams**  
●●●●○ 4.0 Excellent

**Why We Picked It**

Sales Creatio has undergone a number of name changes over the years, but it remains a top CRM choice. Its specialty is larger sales organizations, and it does a good job of catering to their needs. Creatio also offers tools for business process management (BPM), marketing automation, and help desks, enabling customers to address multiple business objectives in a unified way.

**Who It's For**

Sales Creatio is more than capable of scaling to meet the needs of salesforces of any size. That being said, it's complex, and that complexity might make it frustrating for smaller organizations with more modest needs. However, if you have specific needs and are willing to take the plunge, Creatio's low-code development tools allow almost limitless customization.

PROS

- ✓ Multifaceted and highly customizable unified business solution
- ✓ Rooted in solid CRM functionality
- ✓ Creatio CRM helps SMBs streamline processes from lead management to closing

CONS

- ✗ Relatively short trial period
- ✗ Hefty feature set
- ✗ Customization can be daunting at the outset

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## SugarCRM Sugar Sell

**Best Customization**

●●●●○ 4.0 Excellent

Why We Picked It

SugarCRM is notable because it is one of the earliest players in the CRM field, beginning life as an open-source project. The latter fact makes it the most developer-oriented CRM we've tested so far. Every module, portal, and report is editable. That means that, with effort, you'll be able to squeeze every last benefit out of your CRM.

Who It's For

If you know exactly what you want out of your CRM, SugarCRM can show you how to get it. The trade-off is complexity. Large organizations that want to extensively customize the system may find themselves needing assistance from support. And smaller organizations who just want to get up and go might be confounded by the many SugarCRM options. In that case, choose a more SMB-friendly product.

PROS

- ✓ Deep feature set
- ✓ AI-powered data analysis
- ✓ Useful Dashlet reports
- ✓ Tightly integrated with help desk and marketing platforms
- ✓ Great developer tools for customization

CONS

- ✗ Complex enough to require a significant learning curve for new users
- ✗ Stodgy list-based UI
- ✗ Expensive, especially at the higher pricing tiers

SPECS

Document Library	✓
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## Apptivo CRM

Best for Small Businesses

 ●●●●● 4.5 Outstanding

### Why We Picked It

Apptivo CRM is an affordable and highly customizable platform that aims to be a one-stop solution for all your business software needs. In addition to essential CRM functionality, it also includes tools for such tasks as accounting, invoicing, and project management. It's easy to use and includes support for Android and iOS mobile devices.

### Who It's For

Companies that want the convenience of running every aspect of their business from one app will appreciate what Apptivo has to offer. Unfortunately, it has a relatively short list of third-party integrations, so if you've previously used other accounting or project management software, you might find yourself manually importing that data.



PROS

- ✓ Comprehensive feature set with various customization options
- ✓ Outstanding mobile applications, granular security controls, and 24-hour support

CONS

- ✗ Performance can feel sluggish
- ✗ Could use extended APIs

SPECS

Document Library	✓
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## Insightly CRM

**Best for Growth-Stage Businesses**

●●●●○ 4.0 Excellent

Why We Picked It

Insightly delivers a lot of bang for your CRM buck. It's one of the easiest to use among the systems we tested, even if it's not quite as feature-rich as some. Importing data is a smooth process. Insightly's built-in reporting engine is AI-powered, and it provides one-button data export to Microsoft Power BI.

Who It's For

Teams won't dread using Insightly, even if they have little or no previous CRM experience. Its straightforward UI makes tasks easy, even if it's not particularly visually pleasing. However, if you need email marketing or help desk capabilities, be aware that Insightly only provides these as separate, add-on products.

PROS

- ✓ Smooth data input and sharing
- ✓ Slick interface that's consistent and easy to pick up
- ✓ Highly customizable
- ✓ Easy integration with Insightly's help desk and marketing apps

CONS

- ✗ Expensive high-end tiers
- ✗ Lacks advanced features like custom workflows

SPECS

Document Library	✓
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## Pipedrive CRM

**Best for Deal-Oriented Sales Teams**

●●●●○ 3.5 Good

### Why We Picked It

Pipedrive is a deal-driven CRM with much going for it. It has a good-looking UI that's easy to pick up, and bundles a customizable chatbot that companies can add to their websites for lead generation. In addition, it has proactive deal-tracking capabilities that automatically tracks and organizes calls and emails, and synchronizes schedules across devices.

### Who It's For

Deal-driven sales teams should find Pipedrive a natural fit. Its graphical deal pipeline view and streamlined UI won't get in the way of closing sales. However, if you want lots of customization and third-party integrations, Pipedrive doesn't offer as much to choose from as some competitors. Others may see this straightforward approach as a plus.

PROS

- ✓ Offers an intuitive interface and deal-driven workflow
- ✓ Solid mobile apps plus call and email synchronization
- ✓ Helps SMBs keep on top of their CRM process

CONS

- ✗ Limited functionality for the price
- ✗ No separation between lists of new leads and contacts

SPECS

Document Library	✓
Live Chat	✗
Chatbot/Conversational AI	✗

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[Pipedrive CRM Review](#)

## Act! CRM

**Best for Longtime Act! Users**

●●●○○ 3.0 Average

Why We Picked It

In days gone by, Act! led the pack in contact management software. It has since evolved into a more rounded, cloud-based CRM, although it still shows its roots in a dated UI. Act! also has integrated marketing automation features with customizable workflows, and it can connect to Gmail or Outlook (but not very elegantly).

Who It's For

To be blunt, Act! CRM will probably only appeal to people who have past experience with Act! contact management. Its UI is just too unorthodox for the modern SaaS era. That means it's probably most appropriate for small teams, because new hires are likely to balk at its idiosyncrasies.

PROS

- ✓ Integrated email marketing features
- ✓ Easy-to-use dashboard designer
- ✓ Good marketing automation workflow builder

CONS

- ✗ Old fashioned UI is clunky enough to cause problems in many places
- ✗ Email integration requires an external email client
- ✗ Data entry is needlessly convoluted in places

SPECS

Document Library	✓
Live Chat	✗
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## Buying Guide: The Best CRM Software for 2024

### What Is CRM Software?

CRM software helps you track contacts and nurture them to build customer loyalty and repeat sales. A good CRM makes the information it gathers accessible to other business platforms via smart software integration. In this way, CRM becomes the epicenter of how you manage your customer's journey, from the first marketing touch, to a closed sale, and on to the next engagement.

Some small businesses use spreadsheets to mimic a CRM's functionality. However, this type of homebrewed solution delivers just a tiny subset of the features you'd get with a CRM, and it's cumbersome enough that you'll be frustrated once your customer list grows beyond 100 entries.

The best CRM solutions are not only easier to use than spreadsheets, but they also do more than just retain user and contact information. They also automate processes, such as dynamically creating calendar events, setting appointment reminders, prioritizing the sales pipeline, and automatically identifying new sales opportunities. They can even rank opportunities by likelihood of success. What makes that possible is integrating your other customer data so the CRM can access it, such as interactions with your help desk.

This information is a goldmine of opportunity. It lets you identify prospects for up-sell or cross-sell, convert existing customers to new products or services, target new marketing, or track invoices. The software is also a fail-safe because it prevents multiple salespeople from chasing the same prospect. Choosing the right CRM software dramatically improves your team's collaboration and productivity at the same time that it's increasing sales.

### How to Shop for a CRM System

Choosing a CRM is a significant investment. Knowing how your salespeople operate and having some idea of the features that can help them is where your pricing decision needs to start. Only by knowing what you need and then matching that up against the appropriate pricing tier are you going to get yourself the best deal. But there are gotchas beyond that, too.

For example, initial setup and training can eat up a chunk of the budget. So can upgrades and ongoing support. Integrating the software with existing systems might call for additional equipment. Does the CRM workflow mean the sales or customer service teams will need new PCs, smartphones, or tablets? These costs can quickly add up.

What's more, many CRM vendors are expanding their products into a variety of areas beyond customer relationships. They're moving towards managing the sales lifecycle end-to-end, with CRM representing the customer journey. The more expansive the tool, the more customization you'll need to make it work for you. That's why carefully evaluating these products is so important.

As with any piece of software, it's critical to take advantage of free trials when available. No matter how many reviews you read or demos you watch, you can't fully understand how CRM software works until you use it yourself. Be sure to have colleagues from different departments try out the software, too, so you can understand how successful it is in different situations.

Most vendors offer at least a 14-day trial (which is relatively short; 30 days is better). Some, including Apptivo CRM, Insightly CRM, and Zoho CRM offer free plans, albeit with limited features or users. These can either serve as a full-time solution for small companies or a long-term trial for larger companies.

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## What's the Latest in CRM Software?

CRM software is constantly evolving in new ways to help businesses improve their customer interactions and retention. Sometimes that means adding new features and technologies into the mix, while other times it means casting familiar features in a new light. As competing vendors jockey for position in the market, trends emerge that will define the state of the CRM art for the next few years.

One such trend is the tendency for customers to prefer cloud-based CRM systems, which have already had a visible impact on the industry. All of the CRM systems in our most recent tests are available as cloud-based subscriptions, and many aren't available any other way. This model, also known as software as a service (SaaS), has several advantages over traditional, on-premises software, including lower upfront costs and greater scalability and flexibility.

Another relatively recent development is social CRM, which integrates social media platforms with CRM software to help businesses monitor, engage, and manage their social media presence and interactions. Social CRM software can also help companies to leverage social media data to generate leads, identify influencers, and measure customer satisfaction.

Taking the concept of social CRM even further, omnichannel CRM allows businesses to interact with customers across multiple channels and devices, including phone, email, web, mobile, and messaging apps. It aims to provide a unified view of the customer journey and preferences across all touchpoints.

Another novel CRM functionality is known as customer data platform (CDP). These systems collect and unify customer data from various sources, such as online and offline transactions, web browsing, social media, and third-party platforms. CDP can help businesses create a single source of truth for customer data and provide a 360-degree view of the customer.

The revenue impact of AI adoption in CRM (Credit: Statista)

Finally, the rapid rise of artificial intelligence (AI) is well-represented in the world of CRM systems. Over the past few years, CRM vendors have increasingly used AI to automate tasks, provide personalized recommendations, and generate insights from data. AI can also enhance customer interactions through chatbots, voice assistants, and sentiment analysis. And more recently, some vendors have begun experimenting with generative AI, typically based on large language models like ChatGPT, to further improve these capabilities.

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## How to Match a CRM System to Your Needs

The toughest part of making a good CRM choice is understanding what the product can do and what your salespeople actually need. Sales is a difficult and often fast-paced profession, which means your employees could actually feel burdened by the very tool you purchased to help them. That'll kill adoption rates, so you need to understand what they need before tossing more technology into the mix.

It's tempting to forgo this homework and simply pay for one of the big, all-inclusive CRM software packages just to have access to every feature. That approach will almost certainly wind up costing you more in both time and money, while probably delivering less flexibility than you'd expect. That's because these large CRM software packages are often platforms rather than tools. The numerous features they advertise are the product of integrating with a host of third-party solution providers, not merely options you can turn on. Third-party integration means not only added licensing dollars but also new costs.

A better approach is to first understand how your employees will use the software. Think about what tools your team is currently using and what processes they follow. Figure out how those tasks map to the CRM software you're evaluating. Consider what some of the most common tasks are. For example, if a tool forces users to dig through menus and submenus every time they want to log a call or email, the tool will complicate their jobs instead of simplifying them. More and more CRM tools combine the email and sales experience into a single, smart inbox or centralized dashboard view to manage all or most daily communications and tasks without leaving the CRM tool.

The ways in which companies interact with customers are shifting rapidly. Most customers still expect to interact with you via email, but social media is fast becoming a game-changing technology for interacting with customers. Understand how your company interacts with customers over email and make sure your CRM



software complements that relationship and doesn't hinder it. A fully optimized CRM should automatically capture data from email interactions, not force your employees to do that manually.

Once you've looked at requirements from the sales team's perspective, flip it around and think about your customer. Maybe even run an online survey or focus group. What is their best sales experience? Once you know that, you can tailor your CRM to fit.

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## Why Is CRM Data Quality Important?

Data quality should be a key focus of that tailoring process. You'll need to pay attention to customer information that originates inside the CRM and the supporting data imported from other systems, such as finance or service desk tickets. Ensuring this data is "clean" means it needs to be verifiable, in the proper import format, and directly on-target to the CRM's queries.

A study published in 2022 by Validity surveyed more than 600 CRM-using organizations globally. When asked how CRM data impacted sales, 75% of respondents said that poor quality data had cost their firms customers. Another 44% estimated their businesses had lost at least 10% in annual revenue that was directly attributable to bad CRM data (see graphic below).

Estimated annual revenue impact of poor-quality CRM data (Credit: Validity)

Ensuring good data quality is a matter of testing and constant vigilance. You'll need to run regular and repeatable tests on your system. Depending on the size of your staff and your CRM investment, the Validity report recommends you should also consider appointing a data management professional as the lead on keeping your CRM data clean. That person should manage the entire data flow, including not just your CRM but any apps connected to it. They should also handle the full spectrum of data management tasks, including automating data workflows, data protection, and backup. If you feel such a hire is in your future, you should pull that person in as early as possible, preferably at the evaluation stage before you purchase anything.

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## Watch Out for CRM Complexity

Complexity is a common blocker to CRM adoption. Some of the CRM products we review here tout a "highly customizable interface." That means a lot more than simply changing the look. Next to data gathering, a CRM's

next-most important function is as a workflow hub. That means you can decide which data you want to collect, who should provide it, when they should offer it in your usual sales flow, and where it should wind up.

Along the way, you can retool your CRM's interface to show only the tools and features necessary to complete those steps. Everything else can stay in the background until it's needed. It can take a good deal of work to get your CRM to this point, and not all the tested products can do it. But taking advantage of deep customizability is one of the most effective ways to make sure your CRM instance is as easy to use as possible. That's step one for successful adoption.

The other end of the spectrum is what to do when things go wrong. Whether it's a software bug or simply some difficulty using a particular feature, you'll need a responsive support team. You can make that part of your SLA if you've got one, but if you don't, then you'll need to do your own verification:

- Make sure to understand the level of support associated with your pricing tier and whether you can modify it.
- Research the provider's support forum. You're checking for the kinds of questions that are being asked and how long it takes before a response is issued.
- Check for DIY resources. Are there self-service tools for certain issues if there's a support site? If there are, be sure to run through them to see how effective they are. Search the knowledge base to see what kinds of articles are included and the usual format. Make sure this content will be helpful to you.
- Investigate the product's training options. Complex tools usually require some level of training, so see what your service vendor provides. Is on-site, in-person training your only option, or are there online resources, such as well-organized blogs, videos, and recorded webinars?

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## Make Mobile CRM a Priority

Make sure to take a close look at the CRM solution's mobile app. This should be a separate app, not just a mobile "capability" (which almost always means a mobile-optimized version of the desktop website). In addition, you shouldn't pay extra for it. Mobile devices are an entirely different breed from desktops or notebooks. Employees use them differently and software renders them differently, which means that business processes that involve them will behave differently.

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## RECOMMENDED BY OUR EDITORS

Social CRM: Where Social Media Meets Customer Engagement

5 Must-Haves For Your CRM Buying Checklist

A CRM Might Be More Important to Your Business Than Phones

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Make sure your CRM software of choice can support the mobile device platform your team uses. Are you providing every employee an iPhone or is yours a bring-your-own-device (BYOD) environment, which inevitably

means supporting multiple platforms? Next, carefully evaluate what the app can do. Some apps offer a read-only view of your sales pipeline or contacts but don't let you make updates until you get back to a computer. Others offer a seamless and responsive experience, letting you do everything on a mobile device that you would on a computer. Don't commit to CRM software until you've used the mobile app in a way you and your team would do on a day-to-day basis. For many SMBs and their agents, the mobile component of a CRM app might be more critical than the desktop version.

Many CRM vendors cater directly to a mobile workforce. Those apps are full-featured offerings, with responsive web design and layouts dedicated to a mobile experience. If you have a field sales team that leaves their laptops behind and instead works on their tablets and smartphones, then you need to give them the tools they need, and these kinds of apps fit that bill.

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## Can CRM Integrate With My Existing Systems?

Salesforce and other larger CRM platforms have huge feature stacks that are sold as modules, with each module having many related features. If the features are what you need, you can configure your entire solution simply by accessing the right modules. But if something is missing, or your sales staff is simply more comfortable using something else, you may need to use software from third-party vendors to fill gaps.

Integration takes two basic forms. The easiest is if the CRM system or the system to which you're trying to connect supports the other as a "native" integration. That means that the company has a pre-built integration module you can just download and use as needed. You'll have the best luck with big-name targets here, as many companies pre-build integrations for companies such as NetSuite or Salesforce, for example.

The other method is rolling your own integration. This is easiest if both systems have an open application programming interface (API). The most common standard here is representational state transfer (REST). With a REST API, you can have developers build a custom integration for you. That option certainly provides the most flexibility and customization, but it can also add significant costs depending on the level of your coding talent.

It's also worth looking at any third-party software you're considering, or indeed any software you already use, to see if there are integrations available from that side. Maybe you already have email marketing software that you love, or you want to connect your cloud storage service, lead management tool, or customer service management platform. As we've mentioned, you'll want to be able to connect your email account and perhaps your calendar, too.

Another excellent example of a value-add integration with CRM would be your product support or help desk platform. Next to your sales staff, your product support professionals probably have the most direct contact with your customers, and the information they gather in the course of even a short conversation can be gold to a salesperson. Problems with one product line can mean upsell opportunities to another.

Bottom line: Simply knowing that your CRM supports third-party integrations isn't enough, even at the outset of your purchase. The depth of integrations can hugely vary, so you need at least a semi-accurate understanding of the experience you want your salespeople and customers to have, now and in the future. Take your time and map this out as much as you can. You'll vastly decrease the likelihood of a deployment failure and get your staff excited about the new system at the same time.

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## How to Secure Your CRM Data

When you're working with the sales pipeline and customer data, make sure security is top of mind—especially if you're using a SaaS CRM solution (which means a big chunk, if not all, of your customer data resides in the cloud). You should feel comfortable with the company's security requirements. It's a warning sign when your CRM software lets you select a password, but doesn't generate an audit trail whenever someone makes a change, or if it doesn't let you define access controls for each user. Customer data is an extremely valuable commodity, especially now that customers are more reluctant to part with it. Securing it isn't just about maintaining privacy; it's about protecting profitable relationships that directly impact your bottom line.

Integration plays a role here, but it's mostly about research. You can make sure your chosen CRM software integrates with as much of your current IT security software as possible, such as your identity management system, so your employees can take advantage of single sign-on authentication. But even more important than that is doing your homework. That means digging deep into the vendor's service level agreement (SLA) and ascertaining exactly where your data resides, who is responsible for its safety, and what happens if there's a problem. Doing some Google surfing to see whether this vendor has been breached in the past—and if they have, what their response was—is another good indicator of just what you're getting your data into.

## How We Rate the Top CRMs

In this roundup, we tested many of the most popular CRM software packages on the market today. Some are geared more toward small to midsize businesses (SMBs), while others have broader email marketing capabilities. Some CRM systems are easier to use out of the box, with simple navigations and standard workflows. Others offer deeper and more complicated customization. Some are dirt cheap, while others are quite expensive when you start moving up tiers, scaling up your sales workforce, or adding premium functionality.

Our top three selections remain Apptivo CRM, Salesforce Sales Cloud Lightning Professional, and Zoho CRM, services that earned our Editors' Choice distinction for balanced feature sets and thoughtful integration features. Not all CRM solutions fit all business needs, however, so it's important to survey the landscape and try newer entrants, such as Capsule CRM or Zendesk Sell (formerly Base CRM). New solutions can bring just the right amount of innovation to capture an SMBs attention. In the end, it is the balance of a business' needs, the size and scope of its sales team, and how the company engages with its customers that will determine the best CRM solution for a business.

For more on contacting customers, check out the best email marketing software, the best small business CRM software, and the best lead management software.

*Molly McLaughlin and Rob Marvin also contributed to this story.*

### COMPARE SPECS

## The Best CRM Software for 2024

Our Picks				
Salesforce Sales Cloud Lightning Professional	Zoho CRM	HubSpot CRM	Freshsales CRM	Zendesk Sell



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	Visit Site at Salesforce.com <b>EDITORS' CHOICE</b> ●●●●○ 4.5 <u>Editor Review</u>	\$24 Per User Per Month, Billed Annually at Zoho CRM <b>EDITORS' CHOICE</b> ●●●●○ 4.5 <u>Editor Review</u>	●●●●○ 3.5 <u>Editor Review</u>	●●●●○ 4.0 <u>Editor Review</u>	●●●●○ 4.0 <u>Editor Review</u>	
Document Library	✓	✓	✓	✓	✓	✗
Live Chat	✗	✓	✗	✗	✓	✗
Chatbot/Conversational AI	✗	✓	✗	✓	✓	✗
Multi-Currency Support	✓	✓	✓	✓	✓	✗
Pipeline Management	✓	✓	✓	✗	✗	✓
Integrated Email Marketing	✗	✗	✓	✓	✗	✗
Analytics	✗	✓	✗	✓	✓	✗
Custom Dashboards	✗	✓	✗	✓	✓	✗
Email Routing	✗	✓	✗	✗	✓	✗
REST API	✓	✓	✓	✗	✓	✓
24-Hour Support	✗	✓	✗	✓	✓	✗
Phone Support	✓	✓	✓	✓	✓	✓
User Forums	✓	✓	✓	✗	✗	✗
Where to Buy	Visit Site at Salesforce.com >	\$24 Per User Per Month, Billed Annually at Zoho CRM >	Visit Site at Hubspot CRM >	Visit Site at Freshsales >	Compare Quotes and Save at Zendesk Sell >	

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What do you think?

Sort by Best

Sarah Bax

12 July, 2021

Thanks PCMag! I loved your analysis. Very helpful.

In the end I did however select a CRM that is not in this list, called Salesflare (<https://salesflare.com>) so I though I'd let y'all know. 😊

...See more

Salesflare - Simple yet powerful CRM for small businesses

salesflare.com

Reply 15 1 Share

Dave Rubio

15 February, 2021

Good comparison, there are so many sales tools out there, good to narrow it down a bit.

If you need a simple solution which works with email consider <https://www.salestool.app> - my company is using it but we are quite small and don't need a Salesforce. It doesn't have as many features but that's not...

...See more

Reply 5 1 Share

Jenny Pearson

19 November, 2020

Hello,  
Great article. I just miss eWay-CRM and some other CRM in Outlook there. Why?

Reply 8 1 Share

Irogers

10 June, 2021

I'm curious if MS Dynamics was left out of the list on purpose? Does PCMag have an agenda in doing so?


Reply 4 1 Share

1 reply

Jack


24 December, 2020


Interesting article. Recently, while looking for a CRM system, I came across Firmao. I tested the program and I have to admit that I work well with it. It is transparent, easy to use, has many modules that, for example, help in selling or organizing work. It also has accounting functions that are v...[See more](#)


 [link entity](#)

**Firmao - CRM online - Firmao software**  
firmao.net


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**Daniel Lee** ...  
15 December, 2021  
Useful review, as always, thank you for your job! Any ffeedback on Help Crunch may be? I am interested in this software as it is cheaper than analogues, but the features are pretty good as for me. I am on to test out a demo version from these guys.  
Reply ▾ 1  ▾ Share

**Johan** ...  
24 December, 2020  
Great article, thank you very much for this!!! Learned a lot  
Reply ▾ 2  ▾ Share

**camilla barnes** ...  
20 November, 2020  
Hi,  
I agree with Jenny. Can you recommend some CRM in Outlook? I know OCM but that's gone, and eWay-CRM that is our product. So those two are certainly missing in your list.  
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About Gadjo Sevilla



Gadjo C. Sevilla is Analyst, Business for PCMag. Gadjo has covered various aspects of technology including smartphones, laptops, business solutions, and app ecosystems. He began covering technology and innovation 20 years ago for national newspapers, magazines, and various websites including The Canadian Reviewer, which is a tech enthusiast blog he founded in 2008. Gadjo's work has appeared globally in various print and online publications including MacWorld Canada, PCWorld Canada, ITBusiness.ca, WhatsYourTech.ca, The Calgary Herald, The Toronto Star, and Metro News. You can follow him on Twitter @gadjosevilla, connect with him on LinkedIn, or email him at gadjo\_sevilla@pcmag.com.

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About Neil McAllister





Senior Editor



Computer magazines and tech publications had a huge influence on my formative years, so when I was given the opportunity to work in tech journalism, I jumped at the chance. My career studying and writing about tech has now spanned more than two decades. Before *PCMag*, I spent time as a writer and editor at *InfoWorld*, and a few years as a news reporter for *The Register*, Europe's largest online tech publication. Throughout, I've strived to explain deep and complex topics to the broadest possible audience and, I hope, share some of the thrill and fascination I find in this field every day.

**Read Neil's full bio**

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